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The Skin care industry applied to



Is the Male consumer ready for the challenge?

António Maria Jorge Frazão - 152110009

Advisor: Pedro Celeste

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Abstract

Title: The skin care industry applied to L'Oréal Men Expert. Is the Male consumer ready for the challenge?

Name: António Maria Jorge Frazão

The principal objective of this dissertation is to understand the male consumer and their attitudes towards the face care category. Special attention is given to L'Oréal Paris Men Expert. The main goal is to identify and analyze the differences between men and women behaviours, needs and motivations to overcome the existing consumption barriers and maximize the market opportunity for the company. The findings suggest that the male consumer is far away from the female in terms of knowledge of face care products and its consumption. There are consumption barriers and education issues, the companies operating in this industry are one step ahead of the male consumer offering a wide portfolio presenting complex attributes and targeting consumers neglecting the differences in terms of knowledge. L'Oréal Men Expert should develop the category following different steps, starting through the education, explaining to men what benefits the face care category offers are. Once the need for consumption is created, in the consumers mind, product usage should be the focus, teaching consumers how to choose the right product for them. Then, increase the consumption frequency, introducing complementary products. Last but not the least, introduce in the market extra benefits differentiating from other competitors.

1. Introduction

This dissertation focus on the cosmetic face care products targeted for Men, more specifically on how can a company as L'Oréal benefit from this market opportunity, adapting its own portfolio and communication, differentiating itself from competitors increasing its own market share, by deeper understanding of men needs, behaviours, motivations, insights and consumption barriers.

1.1. Relevance to research

The male consumer is evolving, in terms of behavior, needs and also motivations. There are many reasons for this evolution, it can be the new daily routine, the importance of fashion and beauty in our society or simply new consumption habits. It's irrefutable that Men are nowadays more and more consumers of products that in the past were typically for women. Companies that once offered products targeted for women, need now to adapt their strategy in order to take advantage of this recent opportunity.

Understanding the different insights coming from these two types of consumers, the different motivations and behaviours between Men and Women, is the only way that companies have to adapt not only the offer but also the communication in order to target Men.

The objective of this Master dissertation is to identify the main differences regarding needs, motivations and behaviours between Men and Women regarding cosmetics, more specifically face care products, having in mind the maximization of the market opportunity, strategy definition, marketing tools usage and the differentiation from competitors.

1.2. Problem statement

Traditionally, companies use knowledge, know-how and experience of many years targeting women, to target men in the cosmetic market and that doesn't necessarily means that is the right strategy and more effective marketing tool.

Being so, there is a clear need of reinventing marketing to target men in a relative young market.

1.3. Research questions

1. What are the main existing barriers for the male consumers to consume face care products?
2. Which are the male consumption drivers to address and improve penetration and frequency on cosmetic products?
3. How can L'Oréal overcome the consumption barriers in the face care industry and increase the penetration rate and consumption frequency in this industry?

1.4. Methodology

First of all, a market analysis will be done to understand the main consumption behaviours differences. Market size, per capita consumption, preferred channels, average prices, and annual spend will allow to get first conclusions.

Bearing in mind the main findings on the mentioned analysis, a consumer survey will be built to deeper understanding consumption drivers and barriers among men and a comparison between the two targets will be possible. The objective is to find some clues on main issues and development areas on men cosmetic consumption.

Diagnosis and key issues identification will lead to strategic priorities definition. The final objective is to understand what kind of marketing tools can be effective in order to increase men cosmetic consumption, in particular skin care products.

2. Literature review

This literature review has the purpose of presenting the recent literature related directly or indirectly with the main dissertation theme, the masculine face care industry. In order to search for the articles of the Top journals of different areas, key research words as skin care, face care, cosmetics, and consumption differences by genre were used. An additional review of specific books was used in order to complement the information comprised in the articles. The objective will be to start with a broader overview of the theme, ending with the more specific subjects.

2.1. Gender in decision making process

The decision making process in a purchase, it's one of the most important moments that marketers try constantly to influence. According to Alagoz and Burucuoglu (2011, p. 94), gender is the basic characteristic that affects the purchasing behaviour, this may indicate that in some segments more than others, the gender may be where everything starts in terms of segmentation. Shopping was always been seen as a female activity, what can eventually lead to a reasoning about the expertise and habit of women being superior when compared with Men. Since it's a typical feminine activity, it can be expected that women enjoy more shopping, while on the other hand Men are more brand conscious and shopping aversive Jackson et al. (2011, p 402). Having in mind those differences, in terms of shopping styles, they can be divided in two different styles, according to Alreck & Settle (2011), optimising value and price in order to get the very best deal possible or in the other hand satisfying the requirement while it minimises the shopping time and efforts. The fact of a person finding no satisfaction in shopping could be expected to employ the strategy that minimizes shopping time and efforts, while the opposite can be also happen Alreck & Settle (2011, p. 158).

This divergence between genre, may correspond to a whole set of differences that can be seen by marketers as opportunities, women are more keen on browsing, prone to uniqueness and assortment seeking , on the other hand, Men are more prone to convenience seeking as Adjei et al. (2006, p.184) concluded in terms of shopping motives.

The human brain is divided into two hemispheres, *“lateralization consists in the specialization in the functioning of one hemisphere. The left hemisphere specializes in verbal activities and the right hemisphere specializes in spatial perception”* Putrevu (2004, p.52). These facts will influence the information processing and analysis, according to Putrevu (2004), men are more likely to value focused information accompanied by corresponding pictures and graphics, making their preferences regarding advertisement messages consisting in attribute-oriented messages, brand comparisons and features that are unique to that brand. While on the other hand, women should be targeted with advertisements more category oriented, more complex containing more information.

2.2. Female Consumer

Biologically there are differences between male and female, this may also be an influence for the different behaviours, the feminine ovulatory cycle and the associated hormonal factors were tested as possible factors of influence in the feminine shopping behaviour by Durante et al. (2010). In fact, they seem to be an influence in consumption, women tend to seek more sexy products in order to be more attractive. Unconsciously, female decision making process will be influenced. Regarding the habit of shopping and the enjoyment that women have in that circumstance, Bakewell & Mitchell (2003) tested the hypothesis of women from the Generation Y being materialistic shopping style, what was partly validated by the study. One of the key findings of the study was that women of this generation saw shopping as a form of leisure and enjoyment and that one third of the respondents presented high values of brand loyalty. Regarding the female consumer in the specific case of the cosmetic category, Khraim (2011) tested the importance of factors of Brand Loyalty for women regarding this category, the results were the brand name, product quality, price, promotion, service quality and store environment.

2.3. The Male Consumer

As time goes by, the dynamics of societies and the lifestyle evolved as it is normal, nowadays Men have somehow different roles in societies and in families when compared to the beginning of this century. According to Holt & Thompson (2004), due to the masculine ideologies created and circulated allied with the different social

dynamics, men strive to prove their manhood through compensatory consumption. Symbolically men feel the need of proving their manhood, finding different ways in order to somehow get to what the authors call Heroic masculinity.

The decision making style of men can be considered to be evolving, as the role of men in society is shaping itself, although accompanying the increasing of importance of men as shopping group, a increase of interest of their shopping habits rose as well. According to Bakewell & Mitchell (2004), the recreational trend setters, men that enjoy to shop and are fashion conscious are a minority, while the opposite fashion uninterested are the second largest group. Although this lack of interest, one in two men rely on Brands for the decision making, it may be seen as some kind of enhanced of self esteem. Adding to that, there's also one in three men that suffer from some degree of confusion in the shopping process.

2.4. Men and the cosmetic products

Cosmetic products were originally created and targeted for women, this fact may have contributed to be considered as a "feminine" product. According to Fugate & Phillips (2010), product may have gender and even if the tendency is to a gradual softening of the traditional or original gender boundaries, consumption may be influenced by the congruence with the genre. Adding to that, Men are more likely to seek gender congruence with products than women. This may be a consumption barrier for Men regarding cosmetic products, if there's a negative congruence in terms of the genre of the product, it may act as a barrier.

The fact of in the mind of a consumer being seen as a female product, can be considered as a Positioning issue, according Ries & Trout (2001) "positioning is what you do with the mind of the prospect", this may be an important tool to work in order to break the non-congruence barrier. The wrong perception in the mind of the consumer, may be a barrier to influence his purchasing behaviour. The perception can be worked out with a Branding program that differentiates through positioning the products from competitors. As Ries & Ries (1998) states, "a successful Branding program is based in the process of singularity. It creates in the mind of the consumer that there is no product in the market quite like your product". As it is indicated in the

research conducted by Fugate & Phillips (2010), in some cases 13 years of social change can influence the way that consumers nowadays perceive the gender of a product type. This social change, can also be partly work coming from companies efforts operating in that direction.

Other barrier of consumption that can be somehow being connected with congruence is the feeling of embarrassment. According to Argo et al. (2001), embarrassment consists in an emotion that affects the social behaviour. This emotion may occur in several occasions, although, regarding the consumer purchasing, according to the research results indicate that familiarity of purchase and a social presence influence consumers in the moment of a product purchase (Argo et al. 2001). Considering that for the male consumer, that cosmetic products may be somehow embarrassing, the fact of familiarity can reduce the emotion. On the other hand, the social presence that is common in the varied sales channels may influence the purchase moment negatively.

The male consumers are nowadays more aware of the beauty and the need of taking care of its body, making the cosmetic segment no longer a traditional female category Dano et al. (2003). Regarding what is the reason for the development and growth of this industry, Diagne & Souiden (2009) research indicate that in some countries, health does not have a significant impact. On the other hand, physical appearance has a positive effect on men's consumption. The fact of being a recent trend, can indicate that it is more present in the urban and modern areas, rather than in rural areas. According to Priyadarsini (2009), rural men in India, felt delicate to use cosmetics, feeling that it is meant for female and that it is feminine. This validates the research conducted by Dano et al. (2003) that concluded that younger consumers are nowadays more willing to learn and less blocked to learn comparing to their predecessors.

3. Case Study

3.1. The Face care category

Even if not perceived as an organ, the skin is the largest organ of the human body, it's very important to take proper care of the skin, since it's the protection that the body has against external aggressions. The face skin is one of the most sensible parts of the body and adding to that it's highly linked with beauty and health.

The face care category is part of the broader cosmetic industry and it consists in products that have the purpose of taking care of the face skin. It can be seen as a purely functional product, solving skin problems such as acne, wrinkles and dryness among others, as a general health care product to maintain skin characteristics and prevent age symptoms or simply as a beauty product.

Skin needs depend of the type of skin women or men present - there are several skin types that have different needs, normal skin, dry skin, oily skin, sensitive skin or a combination skin.

The face care category can be divided by genre and then in different sub-segments.

Regarding the feminine face care industry, it is divided in cleansing and skin care being the first one with the functional purpose of cleaning the skin, removing excess of oils, removing make up or simply toning the face, the second one it's a much wider segment that has different purposes and functionalities, although it consists in products used for improving the skin health and look.

On the other hand, regarding the masculine face care industry it is subdivided in three sub segments, after shaving consists in products to be used specifically in one situation, after the ritual of shaving. Then, skin care with the same reasons presented above for women, and cleansing that has the functional purpose of cleaning the face skin and also to prepare the skin for the shaving ritual.

Normally companies operating in the personal care segment tend to focus more efforts in women, proven as an attractive and influential target in a household, although for some time men start to be more and more the target of companies that

expect this industry to grow in the coming years. Men way of living and their role in society is evolving as Chris Bates, director of Bloke, a research agency belonging to 2CV states *“Masculinity has been redefined. Men are taking more of an interest in themselves, in home design, cooking and other areas that have traditionally been seen as female¹”*. Their interests changed and their habits regarding personal care is going much further than only using deodorant. This expectable growth in this industry was normally followed by an increase in terms of product offering and more Brands focusing in this category.

The feminine face care market has completely different dynamics when comparing with the masculine market. The focus of this dissertation is in the masculine market and in man as a consumer of this category, with the feminine market being used only once in a while to compare and as reference.

The complexity and dynamics present in the skincare segment and the challenge that companies operating in this segment face in terms of developing such a complex and delicate segment, were the origin of my motivation to write my dissertation about this topic. This master dissertation will focus only on the face care category and its three sub segments (after shave, cleansing and skin care).

3.2. Face care category in Portugal dividing by genre

The face care category in Portugal is still in an early phase in terms of penetration rate and development. This aspect is more visible in the male face care industry than in the female that even if it's still a market that has lower penetration rates when compared with other European countries, the differences are less evident.

Excluding the cleansing segment that, as said earlier, due to the use of make-up, women have a completely different need towards that sub segment compared with Men, the feminine face care industry was worth 26.5 M€² in the Mass market channel

¹<http://www.marketingweek.co.uk/analysis/cover-stories/what-men-want-from-a-brand-relationship/3018175.article>

² Nielsen database, Hipers + Supers, Total Tratamento feminine 2011

in the year of 2011, while on the other side the masculine was worth 11.3M€³. However, there are other important channels in this category being Perfumeries, Pharmacies and Para-Pharmacies, Drug stores and direct sales that show an important sales weight. Not having official data it is important to better understand different channels in order to estimate the full market dimension. In order to have the total value of the whole market, an estimation was calculated (exhibit 1) to have a more accurate analysis of the face care category. The feminine total skin care market in Portugal is estimated in 127.6M€ while the masculine is 34.5M€.

This considerable difference is the first big evidence that these two genres are at different levels of development regarding the skin care.

Going deeper on the analysis and looking at channel prices (from some market visits to several point of sales), this is an important variable to take into consideration. Prices are very different amongst channels, showing perfumeries the highest price (circa 175% vs Mass market), followed by hairdressers (circa 150% vs Mass Market) and pharmacies (circa 140% vs Mass Market). These price levels differences are due to different portfolio (products and brands) and also to factual and perceived channel added value as, for example personal advisory on perfumeries. This difference on channels profile also lead to different buying behaviours from each target. The preference men are showing in the mass market channel⁴ can also be due to a lower product involvement coming from the fact that men show more basic needs and are not willing to pay high prices for their cosmetic products. The opposite behaviour and needs are shown by women a more mature, exigent and sophisticated target that looks for specific benefits and value higher perceived quality, spending more money than men on their cosmetic products. It can be concluded that men pay in average 12€ while women pay 15€. Together with a lower consumption (men consume a third than women being respectively the annual consumption per capita of 0.6 units and 1,8) this allowed to get the annual average per capita spend of 8€ for men versus 27€ for women.

³ Nielsen database, Hipers + Supers, total tratamiento masculino 2011, Total Portugal IND aftershave Un 2011

⁴ survey results: 43% of men prefer the mass market channel, being the preferred channel

This big difference is also explained by very different penetration rates on each target (94% of women use skin care products while only 52% of men do⁵). One of the objectives of the consumer survey analysis will be the identification of main reasons and barriers for this low penetration on men.

From this general market dynamics analysis, we can note that fewer men use skin care products, they are looking for the basic needs provided by products distributed through mass market channels and are not willing to pay higher prices shown in more sophisticated products and brands sold in other channels.

3.3. Men's Face care category

The Men Face care industry, as written above, can be divided in three sub-segments that have completely different dynamics and ways of functioning.

The first one, After shave it's a very functional segment that is just focused in post shave ritual, offering mainly regenerator, healing, smoothing, refreshing and calming benefits to help men's skin to recover from the razor.

Then, the cleansing segment, that offers as well a very specific functional benefit, cleaning of the face, it can be highly coherent with a younger target due to acne and oily skin problems, although it should be inserted in all men's daily ritual, before shaving in order to remove excess oils and death skin cells at the same time that is softening facial hair for a better shaving.

Regarding the Skin care segment, it consists in products that take care of the skin, offering different benefits as anti-ageing, anti-fatigue hydration, care for oily skin, comfort, this is the segment that is more complex since the benefits offered are varied.

Knowing that the Mass Market is the main distribution channel for the skin care men category, the segment analysis will be exclusively held regarding this channel.

⁵ Exhibit 2 : survey

The face care category is a relatively small category in Portugal, in 2011 this category represented 11.3M€⁶ in sales in the mass market circuit, value that is expected to decrease in the year of 2012. Dividing this market in its three sub-segments we have the first one, After shave, that is the biggest in terms of value. The cleansing segment, it's the smaller one. Regarding the Skin care segment, it's the more valuable in terms of unitary price, but due to the low penetration levels, it represents 27% of the total face care industry.

The face care market in Portugal is still under development, currently the sub segment that presents higher penetration rates is the after shave, more basic and functional, presenting higher levels of penetration rate when compared with skin care. This segment presents a share of 69% in value of the face care market, although if we speak in volume this value is even higher. The skin care segment is where there is the higher potential in terms of growth, an higher price allied with higher sophisticated benefits and perceived effects make it a more valuable segment when comparing with the other two segments. Regarding the cleansing market, it represents only 4% of the face care industry, mainly due to the lower value for those products and the low penetration as well as this type of product is easily substituted by soap.

The face care category was born in 2002 by the hands of Nivea For Men, since that year, the category only knew growth until 2010, since that year the category is decreasing in terms of value due to many reasons. In 2011, the market leader was Nivea For Men with a share of 41,5%⁷. The stagnation in terms of development of this category since 2010 can be explained by many reasons, the obvious economical crisis affecting Portugal and varied industries limit the growth of a considered "superfluous" category. Although there are more, the Group product manager of Skin care in L'Oréal Paris, Andreia Lança, states "*this is a growing market in a "resistant target" so it needs more innovation and dynamics in order to promote the continuity.*"

⁶ Nielsen database, Hipers + Supers, total tratamento masculino 2011, Total Portugal IND aftershave Un 2011

⁷ Nielsen database, Hipers + Supers, Nivea For Men value 2011, Total Portugal IND Nivea For Men value 2011

With the skin care men category structure analysis, it can be noted that men skin care consumption is driven by basic and functional needs (after shaving), showing that men consumers are far from being as sophisticated as women in this category.

3.4. L'Oréal Company

L'Oréal is the biggest company operating in the cosmetic industry, created in 1909 by the chemist Eugène Schueller with the name of Société Française des Teintures Inoffensives pour cheveux, for more than 100 years it has been almost one of the synonyms for beauty.

Eugène Scheller, used Research and innovation to enhance beauty, this is still nowadays in the “DNA” of L'Oréal. The expansion of L'Oréal started right away in 1910 in Italy, followed by Austria the year after and Netherlands in 1913. It was in 1939 that the company became L'Oréal as it still is today. The key of the International expansion was in 1954, going overseas to the United States, the largest cosmetic market worldwide, through COSMAIR. In 1974, L'Oréal signed an agreement with Nestlé, this agreement was the future bridgehead to the expansion of L'Oréal in Asia. Later in 1985, L'Oréal created the first skincare products for Men, with the Biotherm Homme. It was later in 2004, in which L'Oréal contributed to the boom of male cosmetics launching the brand L'Oréal Paris Men Expert to be sold in mass market.

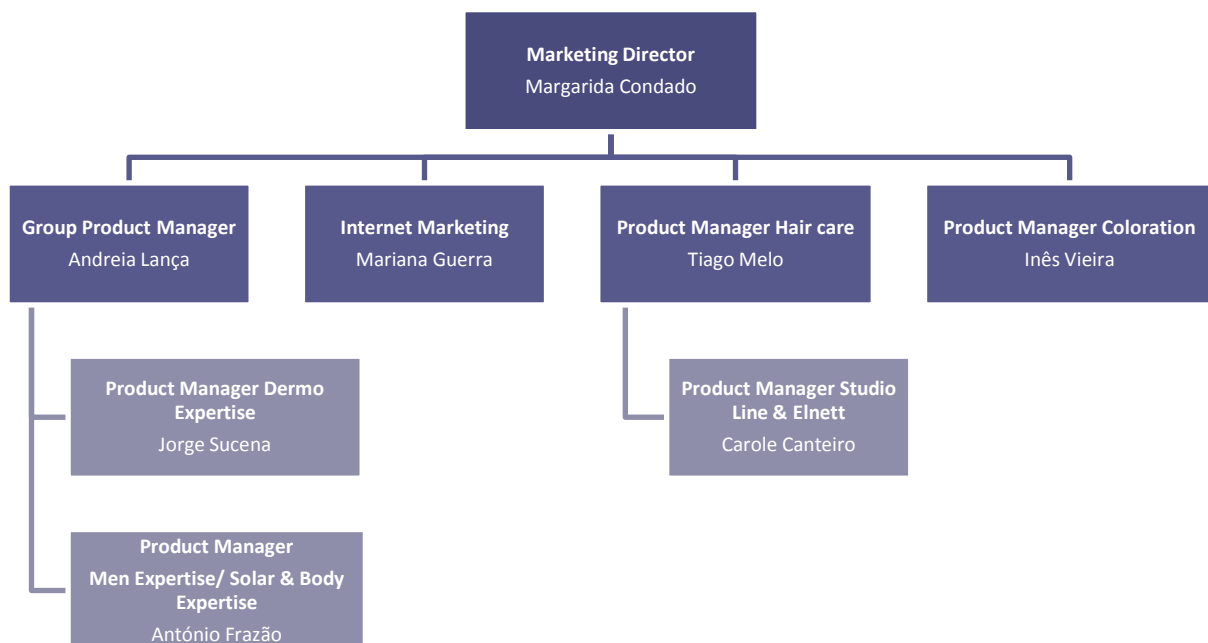
Nowadays, with a mission of “Beauty for Everyone”, L'Oréal provides beauty, with its wide portfolio of products, to more than 1 billion consumers.

It's the Chief Executive Officer, Mr. Jean-Paul Agon that pushes the company even further putting the goal into “*Heading towards Two Billion consumers*”, he's vision of this industry is seen with a mix of ambition and optimism, “*Twenty years from now, the world's population will have increased by 25%, and the number of consumers with access to cosmetics may have grown by some +50%. This is because, once fundamental need have been met, per capita cosmetics consumption grows exponentially.*” In 2010, the consolidated sales reached 19,496 millions €, with 27,2% of this value coming from the skincare business segment.

3.4.1. L'Oréal Paris structure and Marketing department

L'Oréal Paris is a Brand that belongs to the Mass Market division of L'Oréal, DPGP (Divisão Produtos Grande publico), it aims to offer top quality products at affordable prices. In Portugal, the Brand is divided in Hair Care and Skin Care. In Hair Care, L'Oréal Paris offers to consumers the following Brands Elvive, Elnett, Studio Line, Excellence, Casting and Soublime Mousse. On one hand we have Elvive, a well known brand of shampoos and conditioners, then regarding coloration there is Soublime Mousse, Casting and Excellence together they have more than half of the coloration segment. Studio Line and Elnett are well known brands of styling products.

In terms of Skincare, L'Oréal Paris has 4 different sub-brands, Dermo expertise, Body expertise, Solar expertise and Men Expertise. Dermo expertise it's a feminine face care brand that offer a wide range of products for women of all ages, while body expertise offers body care products. For spring and summer seasons, L'Oréal Paris has Solar Expertise a brand of sun care products. All these brands are under the umbrella of L'Oréal Paris Brand, together they're under the guidance of the L'Oréal Paris Marketing Director Margarida Condado.



All this structure works side by side with the Garnier Team and together with the Trade Marketing team and DPGP Sales team, under the DPGP director guidance Rodrigo Pizarro.

3.4.2. L'Oréal Paris Men Expert

L'Oréal Paris Men Expert offers a wide portfolio of products for Men consisting in face care products (Exhibit 2.1), deodorants and shaving foams. For the purpose of this dissertation, even if the perception that consumers have of the brand naturally partly consists in the whole Brand's Portfolio, only face care products will be considered. Men Expert face care offer consists in moisturizers, after shaves and cleansers. Moisturizers can be divided by age, a man's skin has different needs as time goes by making this type of organization a correct approach. On the other side, cleansers and after shaves are purely functional products, offering all ages a very specific benefit.

Men Expert portfolio consists in 3 different ranges Hydra Energetic, Hydra Sensitive and Vita lift. Adding to these, there are some products that doesn't belong to any of these 3, those products offer special benefit/solve a specific problem or are simply complementary products to the rest of the portfolio.

Regarding the Hydra Energetic, it's targeted for Men Consumers with more than 20 years old, its main benefit is hydration and being Anti-fatigue. On the other hand, the Vita lift range it's targeted for Men with more than 40 years old, it's a range that has as main benefits anti-ageing effects. Regarding Hydra Sensitive range, it's targeted to Men with sensitive skin that needs special products for their skin. This peculiar need can be present at any age, it's more likely to occur to younger Men, even though it's a range that is not targeted by age, rather by skin type.

In order to complement those three ranges, there are some spare products. The stop-rides it's targeted for Men with more than 30 years old, it works as a "connector" between the hydra energetic and the vita lift range, its main benefit is to stop the first rides that Men start to have in their 30s. On the other side, Pure & Mat it's a specific product targeted for Men that have oily skin.

From L'Oréal company analysis, it can be noted that it is a big company with strong complexity both in terms of structure and portfolio. With a strong image in the beauty universe, L'Oréal Paris has a strong and well defined territory in the hair care market. Even being the skin care expert image recognised by consumer, L'Oréal Paris is not as

strong in this category as it is in hair care: is not yet category leader (Nivea brand occupies number one position).

Apparently, and after knowing that men are still showing basic needs and behaviours on the skin care market, it can be pointed out that the portfolio structure is some steps ahead of consumption need and behaviours (as in women category many products showing specific benefits while only 15% of men look for specific characteristics).

Currently, in the beginning of 2012, the total face care market is decreasing approximately around 10%⁸, with all players losing at slightly the same rate than the market itself.

The skin care segment it's where there is the main strength of the Brand in the market, the Brand owns 43%⁹ of the market, following Nivea For Men that has slightly more with 48%¹⁰. The Skin care market is almost shared by only those two Brands, with Gillette coming in the third place, defending a small market share of 9%¹¹. Dividing the performance of the Men Expert Range, Hydra Energetic has almost 37% of the total sales of the Brand in this segment, with the big seller in this range being the Moisturizer. On another hand, the 2011 launch Vita lift5 in the second semester that in 6 months reached 8% of the total market share of this category, while the whole Vita lift Range has 28%. Last but not the least, the Sensitive ranges has 11% of the remaining sales of Men Expert in the Skin Care Category.

Regarding the After Shave segment, it can be divided by the type of product itself, balm or lotion. Here Men Expert face fierce and ferocious competition of Nivea For Men naturally strong and linked in this category and Gillette highly linked with the shaving ritual and habit. Adding to those 2 strong Brands, there are varied Brands that offer these types of products as Old Spice, Axe or Denim. Men Expert offers 3 different

⁸ Nielsen, Hipers + Supers, P3 of 2012 vs P3 of 2011.

⁹ Nielsen, Hipers + Supers 2011, Men Expert tratamiento de rostro masculino

¹⁰ Nielsen, Hipers + Supers 2011, Nivea For Men tratamiento de rostro masculino

¹¹ Nielsen, Hipers + Supers 2011, Gillette tratamiento de rostro masculino

after shaves, all of them are Balms, and together they have 5%¹² of the whole market share of this segment.

The Cleansing segment is the smaller segment inside Face care because of the relatively lower prices compared to the other two segments and the lower volume as well. Men Expert offers two products in this segment, together they own 27% of the cleansing market.

3.5. L'Oréal Paris Men Expert competitors in the Face care category

3.5.1. Nivea for Men

Nivea for Men is the leader in the face care market and in all of the sub-segments as well. Offering a complete portfolio (Exhibit 2.2) consisting in three different ranges, Sensitive, Revitalizing Q10 and DNAge, it's the Brand that has a bigger presence in Portugal. The Sensitive range is the stronger range that Nivea For Men has, targeted for Men that have sensitive skin, this segment is the most coherent with the Brand's positioning, making it the most powerful weapon that Brand has. Regarding the Revitalizing Q10, it's a range has the claim of being revitalizing to the skin and anti-fatigue, it's targeted to young and active consumers with more than 20 years old. Last but not the least, the DNAge range, it's targeted to Men with more than 35 years old that seek for benefits related to the ageing issues that skin faces. Adding to these three ranges, there are some complementing products as the after shave Extreme comfort, silver protect, arctic freeze and replenishing.

Nivea was the first brand in the market and has a strong image on the skin care territory, it has shown a consistent and strong brand positioning in tradition, family, safeness, comfort, driving family preference. Being the man consumer simpler and looking for basic and functional needs, Nivea offer addresses this consumer needs and motivations. As the Group Product manager Andreia Lança states *"First of all, Nivea = skin. This link is very strong in consumer's minds both for men or women. Also, Nivea was the first skincare brand for men in Mass Market (and they're on the Top of Mind)."*

¹² Nielsen, Total Portugal IND 2011, Men Expert tratamento de rosto masculino

The first mover advantage in this category, also provides some advantage to the Brand in terms of perception by the male consumer.

Consumers can find Nivea For Men only in mass market with a price that is in average 19%¹³ lower than L'Oréal Men Expert.

3.5.2. Gillette

Gillette is one of the worldwide Brands that are more connected with Masculinity. Due to the strong connection with the shaving process, common to all Men, Gillette's strategy is to take advantage of its strong Brand awareness and leadership in the razors category, canalizing it to the face care industry. Besides this strong arguments, Gillette's position in the face care category is modest, in the after shave market with 10% of market share after Nivea for men, but only representing 9% of the skin care segment and 23% of the cleansing segment. Consumers may only find one range of products (Exhibit 2.3), Gillette series, and then different products with different benefits are offered, for sensitive skin for example. As said before, Gillette tries to take advantage of its main strength, the connection with the shaving process, positioning its products near the razors and shaving foams to enhance cross-selling.

The analysis of the 3 main brands easily corroborates that each brand is the big owner of one territory. To enlarge portfolio and to be relevant in all categories a strong strategy should be defined and consistency over time is critical. All of the three mentioned brands are really strong in the beauty universe being credible to be present in all categories, but as it may be expected, each one is stronger in one territory. While L'Oréal Paris is stronger in Hair Care and expertise in cosmetics, Nivea is highly connected and strong in Skin Care, Gillette is strong Shaving.

¹³ Nielsen scantrack, year of 2011, Hipers + Supers

4. Consumer research

To provide information regarding consumers of the face care industry, an online Survey targeted for all consumers, masculine or feminine, was conducted in order to have a representative sample to provide a relevant statistical analysis. The Online survey (exhibit 4) was conducted between 17 of April 2012 and 5 of May 2012, completed by 335 respondents, 125 Men and 233 Women. The results were analyzed using SPSS and Excel. The structure of the survey was designed with a common part for both Men and Women, followed by additional questions targeted by Genre.

4.1. Male vs female

Women and Men are at different levels of knowledge regarding the face care category, the consumption per capita and penetration rates are examples of this fact. Some questions of the survey were created to test this fact and to expose these differences. In the second question, respondents were asked what was their skin type, with all the different types of skin contemplated and additionally the option "I don't know", if we divide the answers by genre (exhibit 5.1), we can observe that while in one hand only 3,4% of women answered that they didn't know their skin type, on the other hand 19,2% of Men chose the same.

Following this introductory question, participants were asked to rate between 1 and 4, several sentences related to the skin care category and its products directly or indirectly, to test their attitude towards this category and the importance that as consumers they attribute to it. The sentences presented in this question were "It's fundamental to take care of my skin, in order to preserve it for the entire life", "The face and its skin it's a mirror of our health and well being" "A good day cream it's fundamental to keep my face's skin healthy and with good looking" and "the face it's highly connected with the beauty of a person". The results (exhibit 5.2) show that in average Women value higher these sentences when compared with Men. To test this hypothesis regarding if there was or not a difference between genre, a T-test for equality of means was performed (exhibit 5.3), in 3 of the 4 sentences, it was rejected, confirming that Men value differently when compared with women.

Regarding the frequency of use in this category, Men and Women that affirmed being consumers of skin care products, were asked separately what their frequency of use was (exhibit 6). On one hand, 46% of women claimed using skin care products twice per day and 45% once per day, only 9% claimed using skin care products less than once per day. On the other hand, for men, the biggest share was the once per day users 48%, although only 7% claimed using twice per day and 44% less than once per day.

Last but not the least, women and men were asked for their favorite channel to purchase skin care products (exhibit 7.1), women claimed that pharmacies were their favorite place with 41%, followed by mass market with 28% and perfumeries with 25%. Men have chosen mass market being their favorite place with 43% followed by perfumeries and pharmacies with 12% each. 30% of men still answered that it was indifferent the channel of purchase. These results can indicate that while women prefer a superior counseling and help when buying their products, Men are indifferent about the place or rather prefer values more connected with the mass market channel as convenience and better price.

4.2. The male consumer

In order to better understand the male consumer and its habits that are related with the face care category, some questions were asked in the survey, such as “how many times per week do you shave”, “Do you use any kind of product to shave?”, “What disposal do you use to shave?” and “Do you use anything to appease your face after shaving?”. In terms of frequency of shaving (exhibit 7.2), the majority of Men shave 2-3 times per week, followed by once per week, although the answers are divided more or less equally through the 4 different options. Regarding the device used (exhibit 7.2), the great majority of Men uses razor. Having in mind the product used for shaving, the large majority of men uses Shaving gel and Shaving foam (Exhibit 7.2) with results that are at very similar levels rounding the 38%, there’s also those Men that don’t use these kind of products in the same number that those that use Electronic machine what makes sense. Respondents were asked about the type of product used to appease the skin after shaving (Exhibit 8), 30% of Men affirmed users of Moisturizer, while 29% claims being users of After Shave Balm, 20% of respondents claim not using anything at all, while 17% are after shave Lotion users. This division of respondents when asked

the type of product use after shaving can indicate that some skin care products as moisturizers may be substitutes of after shaves.

4.3. Men as a Skin care consumers

Confronted with the question “Do you use any kind of skin care product?” 47% of male respondents claimed not using at all, while 37% affirms users of moisturizers, 9% of anti-ageing moisturizers and 4% of Anti-Bags roll-on. Creating a statistical variable of Skin care Users in order to use a cross tabulation comparing them with the 47% that are non users (Exhibit 9), we can confront the differences between results in order to better understand this consumer. Dividing Men’s responses to the second question, what’s your skin type, we can see that as it may be expected, that 27% of Non users claimed not knowing their skin type confronted with 12%. Adding to this fact, users have higher number of answers in Sensitive skin type (12% vs 3% of non users) and oily skin type (20% vs 14% of non users), these differences may indicate that in cases of special skin necessities, there’s a higher tendency of using skin care products. Having in mind the sentence “It’s fundamental to take care of my skin, in order to preserve it for the entire life” presented in the third question of the Survey, confronting the users against the non users, 89% of the skin care users agree with this sentence (41% of them totally) compared with the 75% of the non users (27% totally).

In order to better understand the habits of the skin care consumers, in the shaving ritual, users seem to have more tendency to use shaving gel (48% comparing with 28% of the non users) instead of shaving foam (30% against 45% of the non users). Regarding the type of product used to appease the skin after the shaving ritual, users of skin care have a higher tendency to use Balm (33% compared with 25% in non users) and lower to use Lotion (10% compared with 23,4% of the non users). As it may be expected, users of skin care, have a higher tendency to use moisturizer as an appeasing product after shaving (45% compared with 16% of non skin care users). Their favourite distribution channel is the Mass Market as it is with the non users, although they have more tendencies to prefer Pharmacies (20% compared with 7%) and generally they are less indifferent (24% compared with 36%).

Considering the age range of the Skin care users, they seem to have a higher tendency to be younger (36% are between 25 and 35 years old compared with 24%, and having in mind the 36 to 49 years old range skin care users are 14% compared with 24%). This tendency may indicate, as said earlier, older consumers have more consumption barrier when compared with younger men.

In order to test the respondents of the survey, a factor analysis was conducted to group consumers by similarity of answers (Exhibit 10). Using the sentences presented in the question 3 corresponding to possible attitudes towards the face care category and the question 19 that consists into possible problems and situations that the male consumer faces, four components originate four segments of consumers.

Transforming these four components into an analysis of what these groups may be (exhibit 11), we come up with the following four segments. The first component can be called "the Rejectors", this type of consumers doesn't see the benefit of using face care products, and they don't understand the product neither the purpose of it. We can observe that their attitude towards the category is negative and they have high results regarding the possible barriers and problems. This component may be where consumers that are highly averse to this category are, the typical thinkers that Face care is a category for women. The second component can be named as "the concerned" since they have positive identification with the category, what may mean that this group do care about these kinds of products. Adding to those results, they still present low score considering the possible problems. This group is where the majority of the face care costumer may be. Then, regarding the third component, it can be called "the Ashamed", stands with a neutral position towards the category, although they feel some of the possible problems and barriers that male consumer faces. This is the segment where the user may not be the buyer, being replaced by mother or wife/girlfriend, the barriers make these consumers' relationship with the category delicate. Last but not the least, the fourth component identified a group that can be called "the confused". They have contact with the products, although they don't understand their benefit, they also find the point of sale of this category confuse making them inhibited in buying products of this category. This group represents

consumers that are ready for being “converted” by education. Once they better understand the benefits and the category, they may be consumers.

4.4. Consumer Research conclusion

An overall analysis of survey results lead to some findings that can help identifying the main issues on men behaviour regarding skin care products. There are still some psychological barriers on skin care products: 31% still think that these products are for women. There is a relevancy problem, men understand the need of skin care to ensure skin health (79% of respondents), but there is still a majority that don't feel identified with the problem (44% of the respondents don't identify themselves with the product) or act on it purchasing it, preferring delegating that task to women (46% assume that they let the women decide and buy those products).

There is still work to be done in terms of awareness and knowledge since 38% don't know skin care products at all and 27% find the shelf confusing.

Adding to the previous factors, there's still a low penetration level, 47% doesn't use any skin care product. From those, 53% don't have the need and 34% just don't know or don't ever think about it. And the frequency of usage is still low, only 55% of users consume daily (while 91% of women do).

Product Value and added value perception is still low, on top of low involvement with this category, preferred channel is the mass market where price is low (43% of respondents choose Hypers or Supermarkets).

4.5. Men Expert challenges & Opportunities

Analysing the L'Oréal Paris on the survey results, we can note that it has good relative perception (exhibit 12) when put together with Nivea and Gillette regarding quality, Innovation and Brand Image. Although, there is still room to improve on the value for money, efficacy, credibility and masculinity. Looking at absolute results, there is no issue on brand health to gain territory on men skin care market.

Since the category is still under development, Men Expert should focus on developing the market, recruiting new consumers, since it would be much more profitable in the

long run to increase the pool of costumers in this category. Although skin care may be the strongest point of Nivea, the small gap existing between the two companies indicate that it may be possible to attack Nivea's position obtaining the leadership. Men Expert should reduce the existing gaps in all sub segments of face care, focusing then in a strategy of development of the face care category as a whole with the objective of being the reference on it. The biggest opportunity consists in the recruitment of new consumers.

The insights obtained from consumers indicated that the company should communicate more clearly and in a simple way more directed to Men, adopting always a role of educating about the category benefits.

5. Conclusion

Analysing the overall picture of this dissertation thesis, the main conclusion is that industry is some steps ahead of consumer. Companies are applying to the men category the same strategy that they apply to the women market, while men consumers are still on the basic stage. Offering a wide and complex range of products as it happens in women, may not be the best choice since it can make face care consumers divided themselves through the different products instead of the end objective of recruiting new men to the category. Women attitudes as consumers of the face care industry and as consumers in general are far away from Men.

The male consumer is not yet adopter of the skin care category while product offers are already more complex adding extra benefits.

Being so, and bearing in mind that we face problems in category relevancy and penetration the strategy should be adapted to it with step by step objective to recruit consumers and bring growth to the category. The step by step route that can be called “Consumer Journey” as it is shown on the figure (exhibit 13). L’Oréal Men Expert must develop the category starting through educating Men about the Skin care importance, explaining clearly the benefits of this category. After teaching the benefits of the category in general and the habit of using skin care products, the male consumer must be taught about the product usage, this step must explain the differences regarding the skin type and the how to choose the right product. Once the male consumer bear in mind the skin care importance and know the product usage, increasing the consumption frequency has to be the objective. The last step should be bringing to the category new benefits.

Companies should bear in mind the differences in the phases that Men are in general. The male consumer is evolving, at the same time that the role of men in society is shifting as well. Even if the tendency is going in the direction of the increase of consumption of face care products, the recent results corresponding to the decrease of this category indicate that companies operating in the face care market must be ready to guide male consumers at different stages through the “consumer journey”,

while some are still at the early beginning, others may already be at the last step asking for extra benefits.

5.1. Limitations and suggestions for further research

The use of online survey was useful and provided interesting insights and results. Even with an adequate sample representative of the populations, respondents were users of internet, what can be an influence for the results since not all the Portuguese population has access to internet. For more insightful and accurate results, a survey in paper conducted in different places may be a good solution. A paper version may secure that all respondents understand correctly the questions and in case of doubts the interviewer may provide help what will lead to more precise results.

Interviews in the point of sale may also bring interesting insights that can lead to new paths and directions. The use of a focus group confronting male consumers with face care products may be an interesting tool to use in future research. These new tools and methodology may provide additional data and information to work.

For further research, an approach of the consumer behaviour in the point of sale and how companies can improve their product disposal and develop materials to influence consumer decision making may be an interesting theme for a dissertation.

6. Teaching Notes

6.1. Synopsis

The male face care category in the mass market circuit was introduced by Nivea For Men in 2002, since that year the category only knew growth until 2011 where it decreased. The obvious difference between men and women regarding attitudes, consumption patterns and knowledge, may indicate that the male face care category has a promising future in terms of growth. This expected growth doesn't correspond to the market's evolution, with a negative 2011, the following year keeps on presenting a negative evolution. The heavy economic crisis affecting Portugal may influence these late results, although this can't be the reason for a decrease in such a promising category. Are the companies present in this category choosing the right path in order to succeed in terms of developing this market? The players of this category are some

steps ahead of what the male consumer wants, there is plenty of room to develop the consumer and the category regarding the use of face care products, companies just have to understand the right path for the success.

6.2. What happened

L'Oréal Men Expert changed its logo in the middle of 2011 (exhibit 14), using more masculine elements, giving more power to the sub-brand Men Expert. The communication also evolved using different ambassadors (exhibit 15) and a more result oriented communication (exhibit 16). The market position of each player is quite stable, without big investments in the category. The market is decreasing in value and volume in the year of 2012.

6.3. Target Audience

The target audience may be students taking courses of Marketing, strategic marketing or Branding of either undergraduate or master level. This case may be used by teachers through different approaches, depending on the objective of the course. It may be studied through a more strategically point of view, or more focused in the consumer behaviour.

6.4. Teaching Objectives

This case allows teachers to make their students create a decision plan for any of the players in the face care industry in order to develop the category. It can be focused in the male consumer behaviour and the existing consumption barriers or in the strategic approach that each player may take. Students have to apply theoretical knowledge learned in class in order to analyse the case and solve it. The main themes of the case are Brand positioning, consumer behaviour, Brand awareness, the STP process, marketing communication.

6.5. Teaching Plan

The teacher may divide the teaching plan into two phases, being the first one individual and the second one in groups. An in-depth class discussion is conducted in the middle of the two phases in order to ensure that all groups start from the same point to the challenge.

The first phase consists in an individual assignment; students receive the case and have a few days to read and analyze it, answering to some questions. The objective will be to apply the theoretical knowledge acquired in class to this specific case.

1- The male consumer has different attitudes, behaviours and is in a different stage of knowledge when compared to the feminine consumer in the face care industry. Explain these differences and the reasons that may be behind them. (15minutes)

Biologically women and men are different and behave differently, the lifestyles and roles in society influence their consumption patterns and behaviours. Moreover, cosmetics were originally created for women, this genre congruence works negatively for men, originating some kind of resistance to use face care products. On one hand, the feminine face care industry is the maturity phase, with many players and a wide offer of different products. On the other hand, the masculine face care category, is in an early stage of the lifecycle, with few players and a limited offer. Adding to these facts, the knowledge that women have regarding this kind of products and their benefits is bigger than men that still struggle to understand the reason why of using face care products.

2- What are the main consumption barriers that the male consumer has in the face care category? (10minutes)

There is a stereotype that this category is a feminine category, what works as a consumption barrier for Men. Adding to that, education is an issue, the benefits brought by using face care products are not understood, what leads to the non recognition of the need by the male consumer. The complexity of the portfolio offered by the brands operating in this category generates confusion in the Point of Sale.

3- Comment on the position that the different players have in the masculine face care industry. What are the main strengths and weaknesses of the players? (20 minutes)

Gillette has high levels of Brand awareness and is highly linked with masculinity, its main strength is other categories linked with the face care as Shaving devices and shaving products. In the consumer's mind, Gillette is linked with the shaving ritual. In

the face care category, the Brand occupies a modest position being the 3rd player of the market.

Nivea for Men is highly connected with skin and simplicity in the consumer's mind, those values come from the umbrella Brand Nivea. The wide portfolio offered to Men is one of the main strengths (face care, shaving, deodorants, hair care, styling, body care). It is the leader in the face care category and in the entire sub segments, being particularly strong in the after shave sub segment.

L'Oréal Men Expert is connected with expertise in cosmetics, using L'Oréal as umbrella brand, also provides values as innovation, quality and expertise in hair care. In the face care category, the Brand has its main strength in the skin care sub-segment where it is close to the leader Nivea For Men.

After the class discussion, students are divided into groups. Each group is the owner of a company operating in the male face care category and has to develop a complete marketing plan for the following years, having in mind the situation of that specific player in the industry. Each group will present in 15 minutes the strategy and the marketing plan.

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8. Appendices

8.1. List of Exhibits

Exhibit 1 – Estimation of the face care total market in Portugal

Starting from the Nielsen values of the mass market channel in 2011, using the weights from survey answers and average prices for different channels obtained from a sample.

Women: Volume(Units), average price (per unit)

Volume	Channel	Weight	Average Price	Channel Value
2393620	Mass Market	28,6%	11,07 €	26.503.458,00 €
2139751	Perfumaria	25,5%	19,38 €	41.461.849,07 €
3445362	Farmácia	41,1%	15,50 €	53.408.483,55 €
36267	Cabeleireiro	0,4%	16,61 €	602.351,32 €
362670	Other	4,3%	15,50 €	5.621.945,64 €
8.377.670				127.598.087,57 €

Men: Volume(Units), average price (per unit)

Volume	Channel	Weight	Average Price	Channel Value
508835	Perfumaria	18,4%	17,96 €	9.139.342,57 €
36345	Barbeiro	1,3%	15,40 €	559.551,59 €
1708232	Mass Market	61,8%	10,26 €	17.532.616,36 €
508835	Farmácia	18,4%	14,37 €	7.311.474,06 €
2.762.247				34.542.984,57 €

Exhibit 2 – Portfolio of products of the face care market

Exhibit 2.1 – L'Oréal Men Expert (Market Share in the sub-segment and Price)

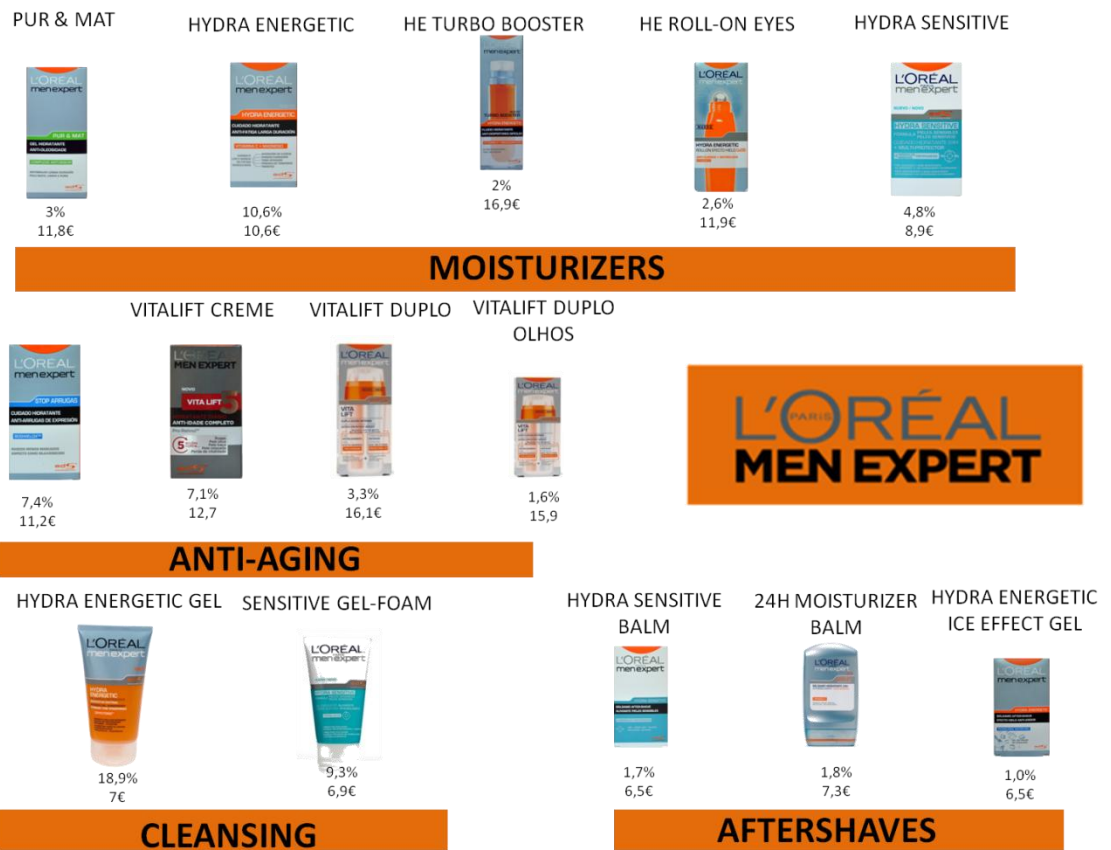


Exhibit 2.2 – Nivea For Men (Market Share in the sub-segment and Price)





Exhibit 2.3: Gillette (Market Share in the sub-segment and Price)



Exhibit 3 – Interview with Andreia Lança, the Group Product Manager of the skin care group of L'Oréal Paris

What are the main reasons for the male skin care market being underdeveloped?

The male market is still underdeveloped in Portugal mostly due to a late perception of need. The younger targets (20-40yo) are more interested and are easier to impact and to promote a change of habits. Older men are more resistant to change: they're stick to their basic routine and they'll hardly admit the usage of skincare products or the aging concern. On the other hand, even these consumers who are already looking for skincare solutions have serious difficulties with this category. They need more information about the products, the problems and the solutions. But they need this information to be clear, simple and rational.

What are the consumption barriers in the face care category for Men?

There are 2 main barriers: psychological (culturally there is still an internal denial of cosmetics, too associated with the female universe) and rational (men want and need to understand everything they purchase and today they still feel there is a lack of clear information in the POS or in the products themselves, they often ask for information to their mother or girlfriend).

What are the main differences between the consumption motivations or needs between Men and Women?

The main differences are: women are more emotional and men are more rational. On the other hand, women are in another stage of evolution regarding skincare. They already understand their main problems and what kind of products exists and what they would need. Men are beginners, so they're still trying to understand what would be their problem and, afterwards, they need to know what kind of solutions the market has today and only then, they would know what's the best for them.

How much is the penetration rate of the skin care market? Since it's still an underdeveloped market, how come the market is decreasing at approximately 10% rate?

Although the market is decreasing in mass market it doesn't mean it will affect the penetration rate in the short term: other circuits may develop different purchase behaviors. Also, this is a growing market in a "resistant target" so it needs more innovation and dynamics in order to promote the continuity.

In your opinion, what are the main reasons for Nivea for Men being the market leader in Men's face care market?

First of all, Nivea = skin. This link is very strong in consumer's minds both for men or women. Also, Nivea was the first skincare brand for men in Mass Market (and they're on the Top of Mind). Finally, they have better DV than all the other players, that obviously limits other purchases.

In your opinion, what are the key success factors of the masculine personal hygiene that have more success in Men's universe?

Simple communication, easy-going lifestyle, clear benefits and exploring the rational side of men. Finally, the appeal of the "children inside" and exploring 'gadgets' can also work. Examples: NIVEA (simple, easy-going, clear); GILLETTE (shaving Ads where the razor made the sound of a F1 car).

Since Gillette it's the brand of reference in shaving products, in your opinion, how come it's not in skin care?

That's a very good question, that's not totally clear.

First, there is a distribution issue: Gillette has less Distribution than Nivea or Men Expert. They also have less products vs the competitors.

Then, while Nivea = Skin care and Loreal Men Expert = cosmetics and expertise, Gillette = Shaving, not care. Also, Gillette focused only in basic moisturizers, while the segment that grows the most and that was underdeveloped is Anti-Aging.

Exhibit 4 – Online Consumer Survey

Questions 1 to 4 and 22 to 25 are for **both Genres**

Questions 5 to 8 **just for Women**; Questions 9 to 21 **just for Men**

Caro Participante, Este questionário faz parte de uma pesquisa para a Catolica-Lisbon School of Business & Economics e visa explorar a percepção e hábitos de consumo referentes a produtos de tratamento de rosto. Não há respostas certas ou erradas, o questionário é anónimo e todas as respostas serão confidenciais. Não demorará mais de 5 minutos. Agradeço desde já o seu tempo.

1) Qual é o seu tipo de pele?

Normal a mista

Seca

Sensível

Oleosa

Não sei

2) Costuma fazer as compras para a sua casa num supermercado ou hipermercado?

Sim

Não

3) De que maneira concorda com as seguintes afirmações (de 1 a 4)?

	1- Discordo totalmente	2- Discordo parcialmente	3- Concordo parcialmente	4- Concordo totalmente
É fundamental cuidar da minha pele, para a preservar para toda a vida.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A pele do rosto é o espelho da nossa saúde e bem-estar.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Um bom creme diário é fundamental para manter a pele do rosto saudável e com bom aspecto.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
O rosto está muito ligado à beleza de uma pessoa.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4) Qual é o seu sexo?

Masculino

Feminino

5) Que produtos de tratamento de rosto está a utilizar de momento?

Creme de dia

Creme de noite

Creme para os olhos

Sérum

Nenhum

6) Com que frequência?

2 vezes por dia

1 vez por dia

Várias vezes por semana

1 a 2 vezes por semana

Menos de 1 vez por semana

7) Compra produtos de tratamento de rosto (after shave, creme hidratante, gel limpeza) para o seu filho/namorado/marido?

Sempre

Uma vez por mês

Uma vez por ano

Já comprei, agora já não.

Nunca

8) Onde prefere comprar os seus produtos de cuidado de rosto?

Supermercado/hipermercado

Perfumaria

Farmácia

Cabeleireiro

Outro

9) Quantas vezes faz a barba por semana?

Menos de uma vez

1 vez por semana / Só aos fins de semana

2-3 vezes por semana

Todos os dias

10) Que dispositivo usa para fazer a barba?

Lâmina

Máquina

Outro

11) Utiliza algum dos seguintes produtos para o barbear?

Gel de barbear

Espuma de barbear

Creme de barbear

Óleo de barbear

Nenhum

Outro

12) Coloca algum produto após o barbear para apaziguar a pele?

After Shave Bálsamo

After Shave Loção/Fluido

Creme Hidratante

Nada

Outro _____

13) Se sim, de que marca?

L'Oréal Men Expert

Nivea For Men

Gillette

Old Spice

Denim

Da mesma marca do meu perfume

Outro

14) Utiliza algum produto de cuidado de pele?

Creme Hidratante

Creme Hidratante anti-rugas

Anti-Olheiras

Nenhum

Outro

15) Com que frequência?

2 vezes por dia

1 vez por dia

2 a 3 vezes por semana

1 vez por semana

Menos de 1 vez por semana

16) De que marca?

L'Oréal Men Expert

Nivea For Men

Gillette

Biotherm Homme

Clinique for Men

Outro

17) Se não utiliza nenhum, qual a principal razão?

Não conheço/Nunca tive contacto

Esses produtos são para mulheres

Não vejo necessidade/Não preciso

Não sei /Nunca me ocorreu usar

Não sei como usar/ Não sei como escolher o mais indicado para mim

18) Qual é o local onde prefere comprar produtos de cuidado de rosto?

Perfumaria

Barbeiro

Supermercado/hipermercado

Farmácia

Indiferente

19) De 1 a 4, como é que se identifica com as seguintes frases?

	1- Discordo totalmente	2- Discordo parcialmente	3- Concordo parcialmente	4- Concordo totalmente
Crems são para mulheres	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Não vejo necessidade em utilizar qualquer produto para colocar na cara	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Não percebo para que servem os produtos de tratamento de rosto para homem	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
É a minha mãe/namorada/mulher que me compram esse tipo de produtos, elas percebem melhor disso	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
O corredor dos produtos de homem no hipermercado é confuso e numa zona má	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sinto-me inibido em comprar produtos de tratamento/cuidado de rosto	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Não conheço produtos de tratamento de rosto masculinos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Não me identifico com este tipo de produtos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20) De 1 a 4 classifique as seguintes marcas nos seguintes aspectos: (Sendo 1 mau e 4 Muito bom) ; Deixar em branco no caso de não ter experiência com a marca.

	L'Oréal Men Expert	Gillette	Nivea For Men
Masculinidade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Qualidade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inovação	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relação qualidade preço	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eficácia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credibilidade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Imagem	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preço	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21) Qual das seguintes marcas é que conhece? (mais que uma hipótese seleccionável)

L'Oréal Men Expert
Nivea For Men
Gillette

22) Que idade tem?

Menos de 16
16-24
25-35
36-49
+50

23) Qual a sua ocupação profissional?

Trabalhador por conta própria

Trabalhador por contra de outrem

Estudante

Reformado

Desempregado

24) Quantas pessoas tem o seu agregado familiar?

1

2

3

4

5 ou mais

25) Qual o seu estado civil?

Solteiro(a)

Casado

Divorciado(a)

Viúvo(a)

Exhibit 5: Analysis of survey answers with SPSS – dividing by genre

Exhibit 5.1: Output SPSS – Question 2: What is your skin type? Answers divided by genre

Qual o seu tipo de pele^a

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Normal a mista	131	56.2	56.2	56.2
Seca	33	14.2	14.2	70.4
Sensvel	19	8.2	8.2	78.5
Oleosa	42	18.0	18.0	96.6
No sei	8	3.4	3.4	100.0
Total	233	100.0	100.0	

a. Qual o seu sexo = Feminino

Qual o seu tipo de pele^a

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Normal a mista	50	40.0	40.0	40.0
Seca	21	16.8	16.8	56.8
Sensvel	9	7.2	7.2	64.0
Oleosa	21	16.8	16.8	80.8
No sei	24	19.2	19.2	100.0
Total	125	100.0	100.0	

a. Qual o seu sexo = Masculino

Exhibit 5.2: Survey Question 3 – output SPSS divided by genre - Rate between 1 and 4 the following sentences

Descriptive Statistics^a

	N	Minimum	Maximum	Mean	Std. Deviation
fundamental cuidar da minha pele para a preservar para toda a vida	125	1	4	3.13	.762
A pele do rosto o espelho da nossa sade e bemestar	125	1	4	3.05	.781
Um bom creme diario fundamental para manter a pele do rosto saudvel e com bom aspecto	125	1	4	2.66	.933
O rosto est muito ligado beleza de uma pessoa	125	1	4	3.32	.725
Valid N (listwise)	125				

a. Qual o seu sexo = Masculino

Descriptive Statistics^a

	N	Minimum	Maximum	Mean	Std. Deviation
fundamental cuidar da minha pele para a preservar para toda a vida	233	1	4	3.64	.637
A pele do rosto o espelho da nossa sade e bemestar	233	1	4	3.43	.698
Um bom creme diario fundamental para manter a pele do rosto saudvel e com bom aspecto	233	1	4	3.56	.661
O rosto est muito ligado beleza de uma pessoa	233	1	4	3.42	.762
Valid N (listwise)	233				

a. Qual o seu sexo = Feminino

Exhibit 5.3: Survey Question 3 – T-test for equality of means comparing Men with Women

Group Statistics

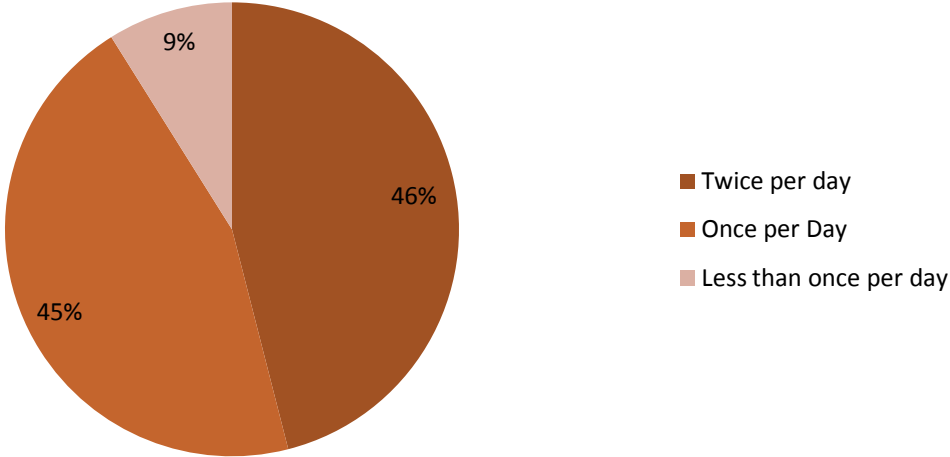
	Qual o seu sexo	N	Mean	Std. Deviation	Std. Error Mean
fundamental cuidar da minha pele para a preservar para toda a vida	Masculino	125	3.13	.762	.068
	Feminino	233	3.64	.637	.042
A pele do rosto o espelho da nossa sade e bemestar	Masculino	125	3.05	.781	.070
	Feminino	233	3.43	.698	.046
Um bom creme dirio fundamental para manter a pele do rosto saudvel e com bom aspecto	Masculino	125	2.66	.933	.083
	Feminino	233	3.56	.661	.043
O rosto est muito ligado beleza de uma pessoa	Masculino	125	3.32	.725	.065
	Feminino	233	3.42	.762	.050

Independent Samples Test

		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
fundamental cuidar da minha pele para a preservar para toda a vida	Equal variances assumed	2.468	.117	-6.701	356	.000	-.507	.076	-.656	-.358
	Equal variances not assumed			-6.349	217.947	.000	-.507	.080	-.665	-.350
A pele do rosto o espelho da nossa sade e bemestar	Equal variances assumed	1.283	.258	-4.721	356	.000	-.381	.081	-.540	-.222
	Equal variances not assumed			-4.564	230.370	.000	-.381	.084	-.546	-.217
Um bom creme dirio fundamental para manter a pele do rosto saudvel e com bom aspecto	Equal variances assumed	25.478	.000	-10.568	356	.000	-.898	.085	-1.065	-.731
	Equal variances not assumed			-9.556	192.339	.000	-.898	.094	-1.084	-.713
O rosto est muito ligado beleza de uma pessoa	Equal variances assumed	1.161	.282	-1.211	356	.227	-.101	.083	-.264	.063
	Equal variances not assumed			-1.229	264.835	.220	-.101	.082	-.262	.061

Exhibit 6: Differences in frequency of use of skin care products by genre

Skin care products - frequency of use Women



Skin care products - frequency of use Men

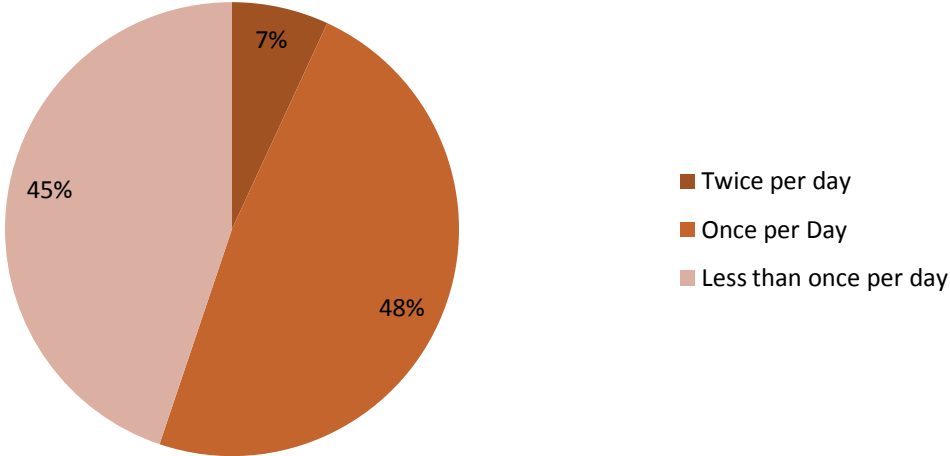


Exhibit 7: Survey analysis regarding habits of male consumers

Exhibit 7.1: Question regarding the favorite place to purchase Skin care products divided by genre

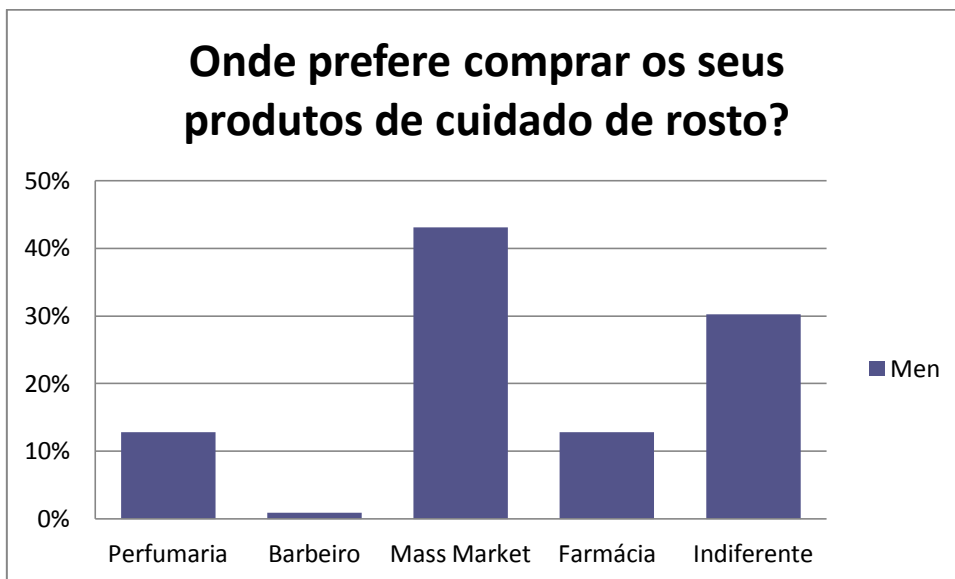
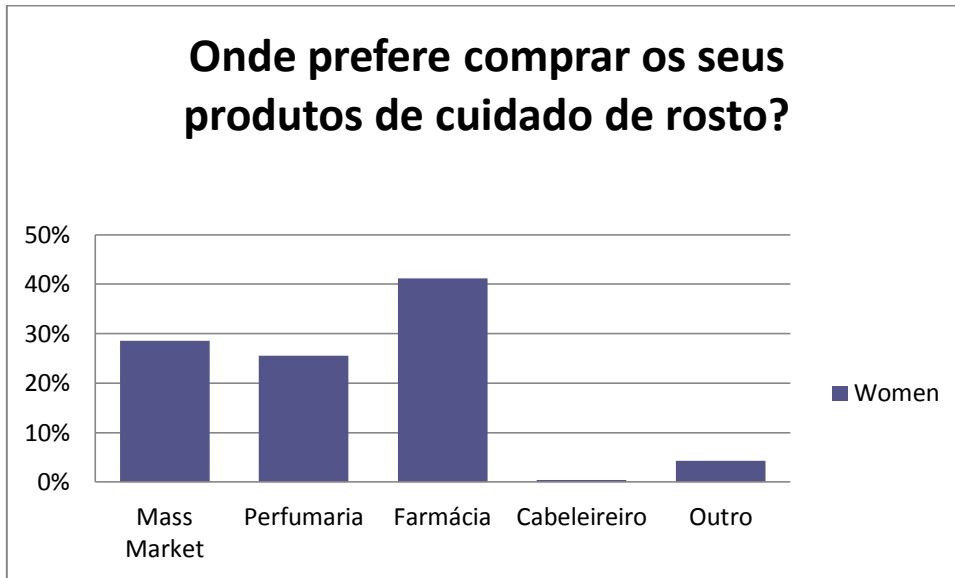


Exhibit 7.2: Survey Question 9, 10, 11 – Frequency and habits of shaving

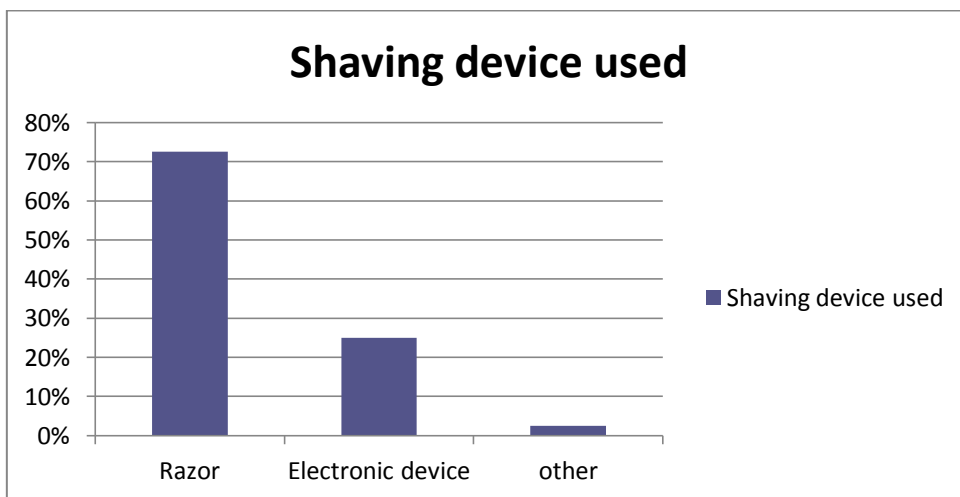
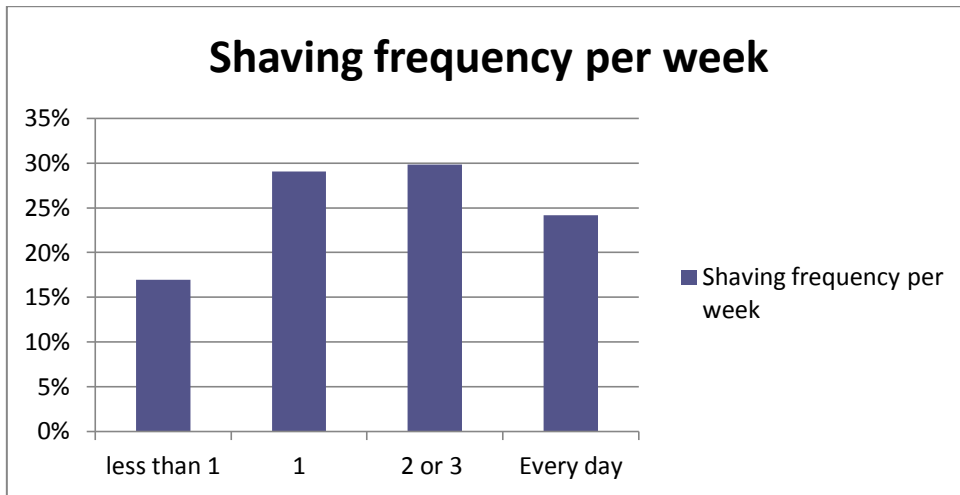


Exhibit 8: Survey Question 12 – What product do you use to appease the skin after shaving?

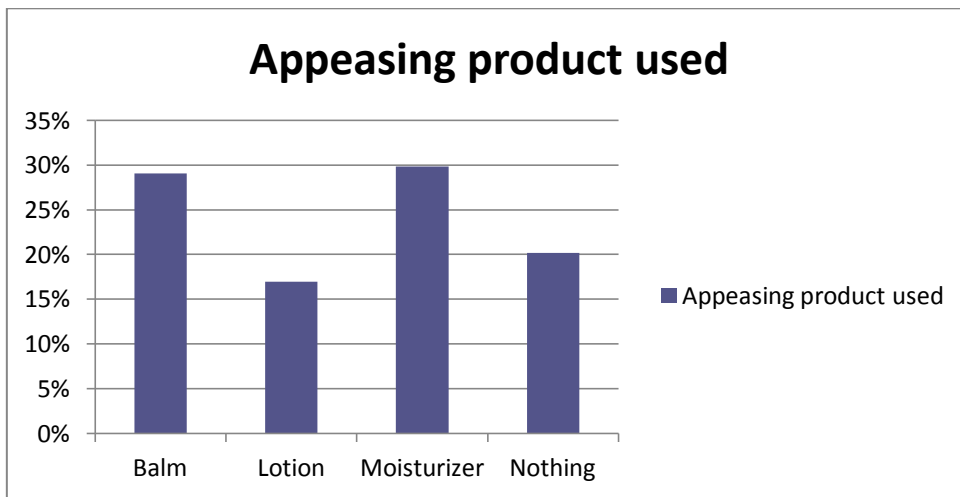


Exhibit 9: Output SPSS, Cross tabulation – Skin care users vs non skin care users

Utiliza algum produto de cuidado de pele * Qual o seu tipo de pele Crosstabulation^a

% within Utiliza algum produto de cuidado de pele

		Qual o seu tipo de pele					Total
		Normal a mista	Seca	Sensvel	Oleosa	No sei	
Utiliza algum produto de cuidado de pele	nao	40.6%	15.6%	3.1%	14.1%	26.6%	100.0%
	sim	39.3%	18.0%	11.5%	19.7%	11.5%	100.0%
Total		40.0%	16.8%	7.2%	16.8%	19.2%	100.0%

a. Qual o seu sexo = Masculino

Utiliza algum produto de cuidado de pele * fundamental cuidar da minha pele para a preservar para toda a vida Crosstabulation^a

% within Utiliza algum produto de cuidado de pele

		fundamental cuidar da minha pele para a preservar para toda a vida				Total
		1 Discordo totalmente	2 Discordo parcialmente	3 Concordo parcialmente	4 Concordo totalmente	
Utiliza algum produto de cuidado de pele	nao	4.7%	20.3%	48.4%	26.6%	100.0%
	sim		11.5%	47.5%	41.0%	100.0%
Total		2.4%	16.0%	48.0%	33.6%	100.0%

a. Qual o seu sexo = Masculino

Utiliza algum produto de cuidado de pele * Utiliza algum dos seguintes produtos para o barbear Crosstabulation^a

% within Utiliza algum produto de cuidado de pele

		Utiliza algum dos seguintes produtos para o barbear					Total
		Gel de barbear	Espuma de barbear	Creme de barbear	Nenhum	Outro	
Utiliza algum produto de cuidado de pele	nao	28.1%	45.3%	3.1%	20.3%	3.1%	100.0%
	sim	48.3%	30.0%	1.7%	16.7%	3.3%	100.0%
Total		37.9%	37.9%	2.4%	18.5%	3.2%	100.0%

a. Qual o seu sexo = Masculino

Utiliza algum produto de cuidado de pele * Coloca algum produto aps o barbear para apaziguar a pele Crosstabulation^a

% within Utiliza algum produto de cuidado de pele

		Coloca algum produto aps o barbear para apaziguar a pele					Total
		After Shave Bisamo	After Shave LooFluido	Creme Hidratante	Nada	Outro	
Utiliza algum produto de cuidado de pele	nao	25.0%	23.4%	15.6%	29.7%	6.3%	100.0%
	sim	33.3%	10.0%	45.0%	10.0%	1.7%	100.0%
Total		29.0%	16.9%	29.8%	20.2%	4.0%	100.0%

a. Qual o seu sexo = Masculino

Utiliza algum produto de cuidado de pele * Qual o local onde prefere comprar produtos de cuidado de rosto Crosstabulation^a

% within Utiliza algum produto de cuidado de pele

		Qual o local onde prefere comprar produtos de cuidado de rosto					Total
		Perfumaria	Barbeiro	Supermercado hipermercado	Farmcia	Indiferente	
Utiliza algum produto de cuidado de pele	nao	13.6%		44.1%	6.8%	35.6%	100.0%
	sim	12.0%	2.0%	42.0%	20.0%	24.0%	100.0%
Total		12.8%	.9%	43.1%	12.8%	30.3%	100.0%

a. Qual o seu sexo = Masculino

Utiliza algum produto de cuidado de pele * Que idade tem Crosstabulation^a

% within Utiliza algum produto de cuidado de pele

		Que idade tem					Total
		Menos de 16	1624	2535	3649	50	
Utiliza algum produto de cuidado de pele	nao	1.7%	43.1%	24.1%	24.1%	6.9%	100.0%
	sim		44.0%	36.0%	14.0%	6.0%	100.0%
Total		.9%	43.5%	29.6%	19.4%	6.5%	100.0%

a. Qual o seu sexo = Masculino

Exhibit 10: Factor Analysis

Only in Male respondents, using the questions 2,3 and 19. Extracting 3 factors (Kaiser Criterion) adding one.

KMO and Bartlett's Test^a

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.780
Bartlett's Test of Sphericity	Approx. Chi-Square	445.353
	df	66
	Sig.	.000

a. Qual o seu sexo = Masculino

Communalities^a

	Initial	Extraction
Costuma fazer as compras para a sua casa num supermercado ou hipermercado	1.000	.576
fundamental cuidar da minha pele para a preservar para toda a vida	1.000	.708
A pele do rosto o espelho da nossa sade e bemestar	1.000	.657
Um bom creme diario fundamental para manter a pele do rosto saudvel e com bom aspecto	1.000	.639
O rosto est muito ligado beleza de uma pessoa	1.000	.552
No vejo necessidade em utilizar qualquer produto para colocar na cara	1.000	.705
No percebo para que servem os produtos de tratamento de rosto para homem	1.000	.720
a minha menamorado mulher que me compram esse tipo de produtos elas percebem melhor disso	1.000	.690
O corredor dos produtos de homem no hipermercado confuso e numa zona m	1.000	.645
Sintome inibido em comprar produtos de tratamentocuidado de rosto	1.000	.558
No conheo produtos de tratamento de rosto masculinos	1.000	.679
No me identifico com este tipo de produtos	1.000	.823

Extraction Method: Principal Component Analysis.

a. Qual o seu sexo = Masculino

Total Variance Explained^a

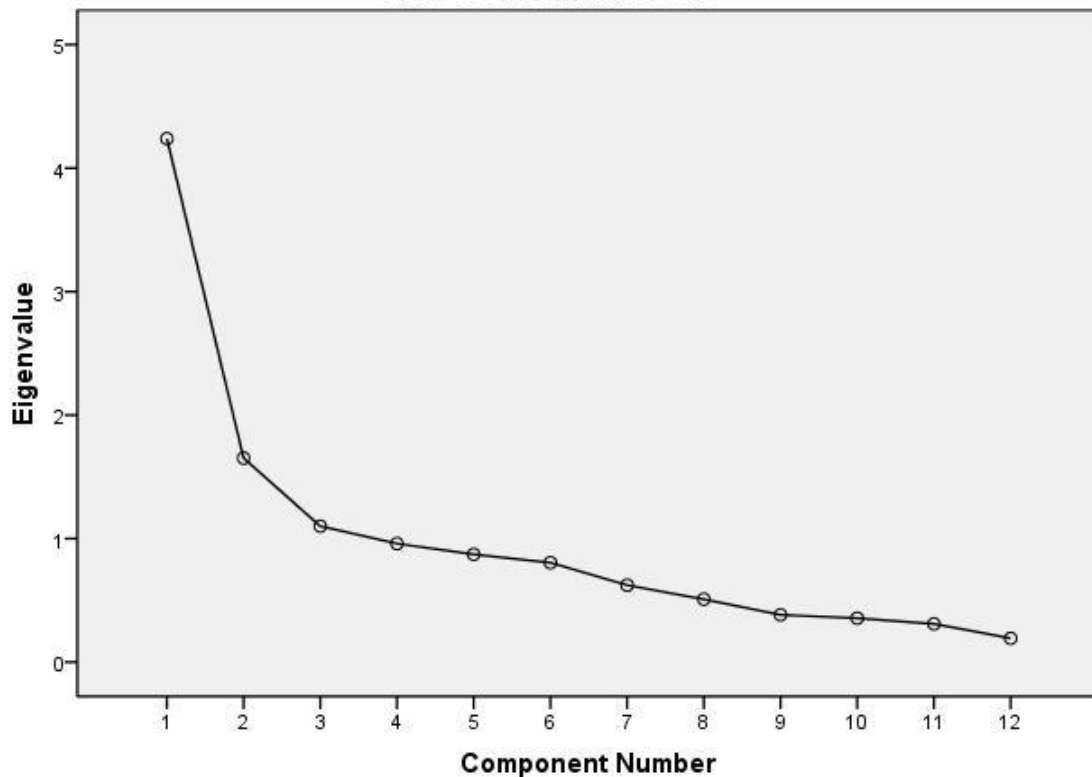
Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	4.238	35.320	35.320	4.238	35.320	35.320	2.855	23.788	23.788
2	1.652	13.764	49.085	1.652	13.764	49.085	1.884	15.703	39.491
3	1.101	9.171	58.256	1.101	9.171	58.256	1.859	15.496	54.986
4	.959	7.995	66.251	.959	7.995	66.251	1.352	11.265	66.251
5	.872	7.269	73.520						
6	.805	6.711	80.231						
7	.623	5.192	85.424						
8	.509	4.241	89.665						
9	.383	3.189	92.855						
10	.356	2.964	95.818						
11	.309	2.579	98.397						
12	.192	1.603	100.000						

Extraction Method: Principal Component Analysis.

a. Qual o seu sexo = Masculino

Scree Plot

Qual o seu sexo: Masculino



Rotated Component Matrix^{a,b}

	Component			
	1	2	3	4
Costuma fazer as compras para a sua casa num supermercado ou hipermercado	-.034	-.110	-.042	.749
fundamental cuidar da minha pele para a preservar para toda a vida	-.443	.705	-.016	-.122
A pele do rosto o espelho da nossa sade e bemestar	-.403	.566	-.081	-.409
Um bom creme diario fundamental para manter a pele do rosto saudvel e com bom aspecto	-.509	.594	-.157	-.051
O rosto est muito ligado beleza de uma pessoa	.082	.710	-.082	.184
No vejo necessidade em utilizar qualquer produto para colocar na cara	.801	-.196	.149	-.059
No percebo para que servem os produtos de tratamento de rosto para homem	.811	-.130	.130	.165
a minha menamoradoamulher que me compram esse tipo de produtos elas percebem melhor disso	.037	-.243	.793	-.004
O corredor dos produtos de homem no hipermercado confuso e numa zona m	.070	.259	.384	.652
Sintome inibido em comprar produtos de tratamentocuidado de rosto	.262	.090	.604	.341
No conheo produtos de tratamento de rosto masculinos	.372	-.069	.732	.004
No me identifico com este tipo de produtos	.847	-.056	.320	-.023

Extraction Method: Principal Component Analysis.
 Rotation Method: Varimax with Kaiser Normalization.

- a. Qual o seu sexo = Masculino
 b. Rotation converged in 9 iterations.

Exhibit 11: Analysis with the output of the Factorial analysis

4 segments corresponding to positive attitudes in green and negative attitudes in red

	The Rejectors	The concerned	The ashamed	The confused
Costuma fazer as compras para a sua casa num supermercado ou hipermercado				
É fundamental cuidar da minha pele, para a preservar para toda a vida.				
A pele do rosto é o espelho da nossa saúde e bem-estar.				
Um bom creme diário é fundamental para manter a pele do rosto saudável e com bom aspecto.				
O rosto está muito ligado à beleza de uma pessoa.				
Não vejo necessidade em utilizar qualquer produto para colocar na cara				
Não percebo para que servem os produtos de tratamento de rosto para homem				
É a minha mãe/namorada/mulher que me compram esse tipo de produtos, elas percebem melhor disso				
O corredor dos produtos de homem no hipermercado é confuso e numa zona má				
Sinto-me inibido em comprar produtos de tratamento/cuidado de rosto				
Não conheço produtos de tratamento de rosto masculinos				
Não me identifico com este tipo de produtos				

Exhibit 12: Survey question 21

Perception of the Brands in different values

	Men Expert	Nivea	Gillette
Masculinidade	2,47	3,61	2,92
Qualidade	3,08	2,96	3,05
Inovação	3,05	2,91	2,94
Relação Qualidade Preço	2,27	2,53	2,83
Eficácia	2,70	2,89	2,85
Credibilidade	2,98	3,13	3,18
Imagem	3,05	3,18	3,06
Preço	2,17	2,41	2,56

Exhibit 13: Consumer Journey

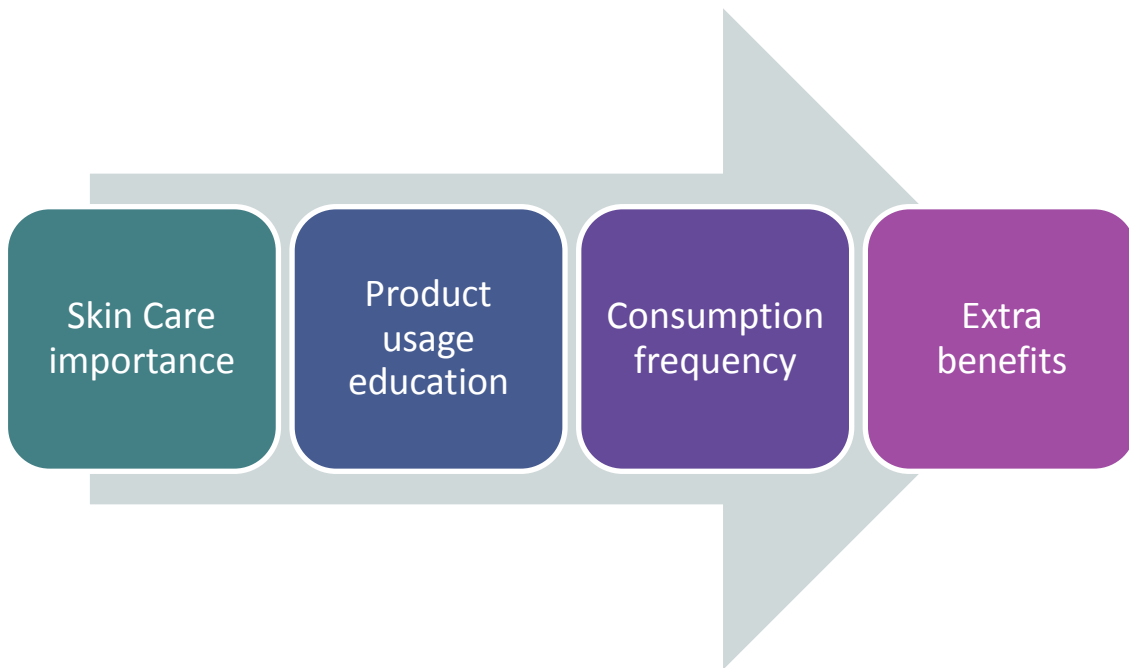
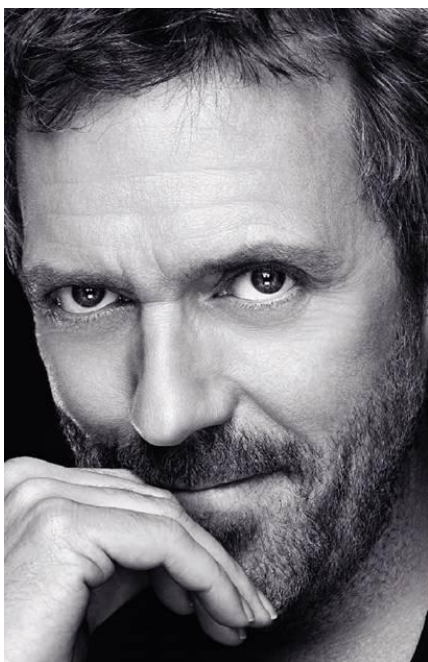


Exhibit 14: L'Oréal Men Expert change in logo (middle of 2011)



Exhibit 15: L'Oréal Men Expert ambassadors in 2012 – Hugh Laurie, Gerard Butler and Harvey Newton



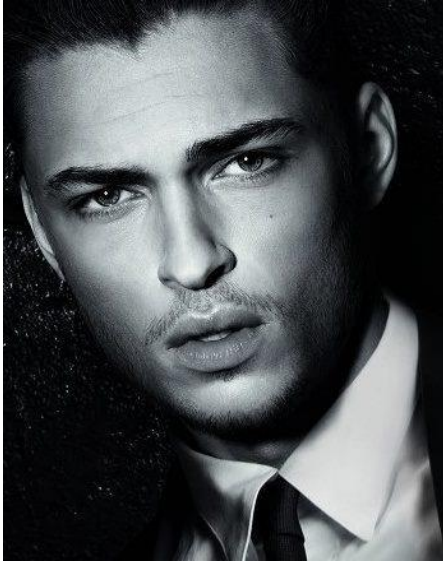


Exhibit 16: 2012 Press

02_HydraEnergetic_Presso_317x236.pdf 1 12/03/08 34:28

24H DE PURA ENERGIA
A SUA DOSE DIARIA
DE VITAMINA C

HYDRA ENERGETIC
PROGRAMA ANTI-FADIGA

CREME HIDRATANTE

ROLL-ON OLHOS ANTI-FADIGA

L'OREAL MEN EXPERT

HYDRA ENERGETIC

CUIDADO HIDRATANTE
EFFECTO ANTI-FADIGA 24H

L'OREAL MEN EXPERT

OLHOS

L'OREAL PARIS
MEN EXPERT

CANSADO, EU? NUNCA.
E A MINHA PELE TAMBÉM NÃO!

GERARD BUTLER, ACTOR

02 Sebodo_Vitalift_200x76.pdf 1 12/06/20 11:29



**1 GESTO
5 ACCOES
ANTI-IDADE
PARA UM ASPECTO
MAIS JOVEM**

VITA LIFT 5
PROGRAMA ANTI-IDADE

CREME
REVITALIZANTE

ROLL-ON OLHOS
REVITALIZANTE



**L'ORÉAL
MEN EXPERT**

VITA LIFT 5
RESISTANTE DIÁRIO

**L'ORÉAL
MEN EXPERT**

SEJA VOCÊ MESMO,
MAS NÃO SE DEIXE RELAXAR!

MICHAEL LAURIE, actor